HIGHLIGHTS

WEEK ENDING: APRIL 27, 1990

INDUSTRY WEEKLY SALES

- This week's volume of 11.1 billion units was ahead of the Industry's estimated going rate by approximately 1.0 billion units, due primarily to speculative loading by the trade in anticipation of an end of quarter price increase.

PM WEEKLY SALES & SHARE

- This week's sales of 4.8 billion units were inflated over PM's going rate as accounts built-up additional inventory in anticipation of a price increase. Moreover, sales benefited from the introduction of four new Bristol packings (Full Flavor 85's & 100's, Ultra Light 100's and Non-Filter) and expanded coverage of Bristol to include 90% of Sub-Generic volume.

- PM's weekly share of 43.4 was above normal due to the varying programs of the other manufactures and Bristol's introductory volume. On a year-to-date basis though this week, PM holds 41.0% of total Industry volume.

MANUFACTURER PROGRAMS

- **Philip Morris** - Effective with shipments for the week ending 4/6, and until further notice, accounts are limited to 130% of an average week on all brands, except Alpine, Bristol and Superslims which are limited to reasonable quantities.

- **R.J.R.** - Continued to restrict its accounts to 125% of an average week on all brands.

- **Brown & Williamson** - No allocation program reported.

- **Lorillard** - Effective 4/10 and until further notice, accounts are limited to 130% of an average week.

- **American** - Effective 4/4 and until further notice, accounts are limited to 130% of an average week on all brands, except Montclair and test brands which are limited to reasonable quantities.

- **Liggett** - No allocation program reported.

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Source: https://www.industrydocuments.ucsf.edu/docs/ktjm0004